



The Uniform Solution

Session I – Getting Connected
8:30 am to 10:00 am



Welcome to Orlando!

Everything is Connected



- ▶ Technology no longer operates independently
- ▶ Today companies are integrating systems and technology and gaining benefits and efficiency from that integration
- ▶ The Uniform Solution “connects” you to your vendors and to your customers!

The Connected Uniform Retailer



- ▶ Uses the Vendor Catalog
 - The Catalog List and the Catalog Utility are indispensable for updating items, pricing, and marking items as discontinued
- ▶ Automatically Creates Purchase Orders
 - Model stock plans are defined for each vendor
 - Re-orders seasonal merchandise based on items sold
- ▶ Utilizes EDI and ASN's
 - Electronic purchase orders are entered quickly and error free
 - Using an advance ship notice is the fastest way to receive merchandise – period.
- ▶ Relies on Vendor Stock and Product Images
 - Knowing the stock status during order entry is empowering
 - Product images provide visual confirmation during order entry and are indispensable for the WebStore
- ▶ Emails Invoices, Account Statements, etc.

What Do I Need to be a Connected Uniform Retailer?



- ▶ The Uniform Solution
- ▶ Broadband Internet Access
- ▶ Initiative

Connected Vendors



Vendor	EDI	ASN	VStock	Images
Barco	Yes		Yes	Yes
IguanaMed	Yes		Yes	
Koi	Yes		Yes	Yes
Landau	Yes	Yes	Yes	Landau Brand
Peaches	Yes	Yes	Yes	Yes
Prestige Medical	Yes			Some
Strategic Partners (Cherokee, Littmann, Dickies Medical)	Yes	Yes	Yes	Yes
White Swan	Yes	Yes		
White Cross	Yes	Yes		



Workshop Outline

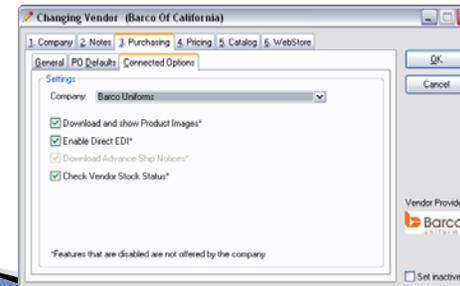


- ▶ Setting up the Connected Features
- ▶ Using the Catalog List and Utility
- ▶ Developing a Model Stocking Plan
- ▶ Auto-Creating Purchase Orders
- ▶ Sending an EDI Order
- ▶ Receiving by the Carton (ASN's)
- ▶ Real-time vendor stock status
- ▶ Vendor Provided Product Images
- ▶ Setting up and Using Email

Setting up the Connected Features for a Vendor



- ▶ For each "Connected" Vendor on the Vendor List, select the company in the Connected Options **Company** drop list



Setting up the Connected Features for a Vendor

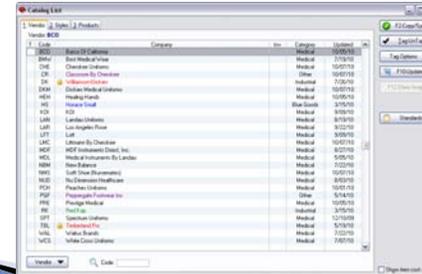


- ▶ Task 1
 - Select **Lists > Vendors** and select to update **White Swan**
 - Select the **Purchasing** Tab
 - Select the **General** Tab
 - Set Account Number to "PDSTX"
 - Select the **Connected Options** Tab
 - Set the Company to **White Swan Meta**
 - Verify all connected features are set to true
 - Select OK to save the changes
 - On the **Vendor List**, what is the value in the "Connected" column for White Swan? _____

The Catalog List and Utility



- ▶ In order to use the use the "Connected" features, you have to use the Catalog
- ▶ Why?



The UPC Barcode



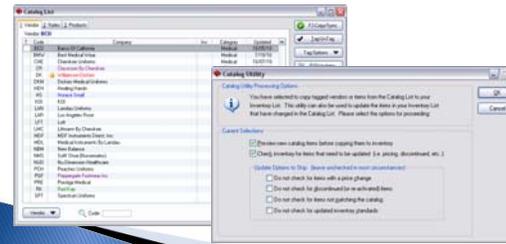
- ▶ Definition
 - Universal Product Code
 - A universally unique number issued by GS1.org
 - 12 or 13 digits (8 is common in grocery industry)
- ▶ Why it matters
 - This number is used in EDI, ASN, and Vendor Stock reporting and is key because it provides an exact match between an item in The Uniform Solution and the vendor's system



The Catalog List and Utility



- ▶ Features
 - New Catalogs can be downloaded in just seconds
 - Update prices, discontinue items, and copy new items to your inventory list
 - Product images are automatically downloaded after copying new items to inventory



The Catalog Utility



- ▶ Task 1 – Copy ONLY the following items to the Inventory List for Peaches
 - Select **Lists > Catalog**
 - Select **Peaches** on the List (now all Peaches items are tagged)
 - Select **Peaches** on the list again (now **NO** Peaches items are tagged)
 - Select the **Styles Tab** for Peaches
 - Use the **Style** field to quickly locate a style in the table
 - **Right-click** the **style** or the **style and color** and make the proper selection
 - Select **F2-Copy/Sync > OK** and complete the Wizard to add your selections

Item	Colors
4204	All Colors
4214	NAVY, ROYL
N6451	WHIT

The Catalog Utility



- ▶ Task 2 – Sync Landau Inventory with the Catalog

- Tag **Landau** on the Catalog List and select **F2-Copy/Sync > OK**
 - Step 1 of 4 – Styles or Products Not Matching the Catalog
 - Why are there items that need the UPC removed?
- Why are the items at the bottom selected to Match the catalog?
- Select: **Update**
- After the process **restarts**, continue on next page (i.e. slide)
- Why does the process restart sometimes?
 - Some operations (or steps) influence the utility, so if one of these steps is NOT skipped, the process must restart to make sure it considers the items that were just updated.

The Catalog Utility



- ▶ Task 2 – Sync Landau Inventory with the Catalog
 - Step 1 of 4 – Update Cost and Retail Pricing
 - Check: **I have reviewed the retail pricing update settings**
 - Check: **Update the retail price based on the markup formula for the vendor**
 - Check: **Print a tag for each in-stock item with a retail price change**
 - Select: **Update**, Do not actually print the tags
 - Step 2 of 4 – Discontinued Styles
 - Select: **Print List > Preview**. How many pages of discontinued items are there? ____
 - Select: **Update**
 - Step 3 of 4 – Inventory Standard Not Matching the Catalog
 - Select: **Update**
 - Step 4 of 4 – Copy New Items
 - Select: **Print List > Preview**. How many pages of new items are there? _____
 - Select: **Update**
 - Landau is now completely up-to-date and matching the Catalog

The Catalog Utility



- ▶ How to handle a vendor that has too many missing UPC's
 - Print the Current Reorder Points for the Vendor
 - Select **Reports > Inventory > Inventory with Max Levels** to get the re-order points for the vendor
 - Auto-Discontinue All Items for the Vendor
 - Select **Lists > Vendors > Vendor Button > Auto-Discontinue All Items** to automatically discontinue all items
 - Set all stock levels to zero for the vendor
 - Select **Activities > Physical Inventory**
 - F2-Clear List so there are no item quantities
 - F5-Update the inventory for the vendor – all stock levels will be zero
 - Use QuickLoad to Set the Current Stock Levels and Print New Tags
 - Select **Activities > QuickLoad** and follow directions to scan the UPC barcode
 - Re-enter the Max/Min Values for Vendor
 - Don't receive stock items using previously created PO's. Use the option to "Add items not on a PO". Do use the original PO for special order items.

Creating Model Stock Plans to Auto-Create Purchase Orders





- ▶ **Talk to Your Sales Representative** (Landau, Peaches, Cherokee, etc.)
 - Develop a model stocking plan based on previous sales, floor space, and your goals
 - Set the Max/Min values in The Uniform Solution
 - Enter the Max/Min values for each item
 - Import a provided plan into The Uniform Solution (Cherokee, Landau, Peaches)
- ▶ **Develop your own plan**
 - Start with a high level approach and work down to the item level
 - Eliminate or reduce stock of poorly selling vendors or products (Inventory Aging)
 - Determine the best selling styles, colors, and sizes (Top 40 Sales)
 - Compare sales levels to stocking levels (Detailed Item Sales)

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Importing a Vendor Provided Model Stock Plan



- ▶ **Task 1 – Review the max/min settings for Peaches**
 - Select **Reports > Inventory > Inventory with Max Levels**
 - Vendors to Include: **One**
 - Vendor: **Peaches**
 - Select **OK**, then **Preview**
 - How many pages are on the report? _____
- ▶ **Task 2 – Import the model stock plan**
 - Select **Maintenance > Inventory Utilities > Import Max/Min Values**
 - Vendors to Include: **PCH**
 - Departments to Include: **All**
 - Style and Products to Include: **File** (this limits items updated to just items in the file)
 - Select OK and Pick **c:\usworkshop2010\import\Peaches_Fall_2010.csv**
 - How many items for Peaches were updated with Max/Min values? _____
- ▶ **Task 3 – Review max/min settings for Peaches**
 - How many pages are on the report? _____

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Developing a Model Stock



- ▶ **Task 1 – Create the Max/Min Values below for the following items:**

Item	Sales per Month	Max	Min
190-CIEL-XS	0.3		
190-CIEL-S	2		
190-CIEL-M	12		
190-CIEL-L	6		
190-CIEL-XL	3		
190-CIEL-2XL	1		

Task Guidelines

- Selling Zero or less
Keep none in stock
- Selling < 1 per month
Max = 1 Min = 1
- Selling 1-2 per month
Max = 1 or 2 Min 1
- Selling 3-4 per month
Max = 3 or 4 Min = ½ Max
- Selling 5+ per month
Max = Greater of 4 or ½ Sales
Min = ½ Max

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Creating Purchase Orders



- ▶ **The Auto-Create Feature**
 - Reordering “CORE” Stock
 - Reordering Fashion Merchandise
- ▶ **Advanced Purchase Order Features**
 - Cancel All Back Orders
 - Ignore Minimums
 - Ship Complete
- ▶ **Using EDI to Send Orders Electronically**



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Auto-Creating Purchase Orders



- ▶ Task 1 – Create Purchase Orders for all Vendors
 - Activities > Purchase Orders > F2-Auto-Create
 - Check: **Inventory below desired stock levels**
 - Check: **Special Orders that need fulfillment**
 - Check: **Drop shipments**
 - Vendors to Include: **All**
 - How many purchase orders were Created? _____
- ▶ Task 2 – Create a PO of Items Sold for Barco
 - Activities > Purchase Orders > F2-Auto-Create
 - Check: **Items sold within a date range**
 - Uncheck the other options in Include
 - Vendors to Include: **One**
 - Vendor: **Barco**
 - Start Date: **10/01/10** End Date: **10/31/10**
 - How many items were ordered for Barco? _____

Using the EDI Feature



- ▶ Sending a Purchase Order using EDI
 - Task 1
 - Select a PO on the PO List
 - Select **F11 – EDI PO**
 - Since we do not have a valid purchase order and do not have Internet access, Select **No**
 - Is that hard to do? _____
- ▶ Checking the Status of an EDI Order
 - Task 1
 - Once a PO has been sent using EDI, you can verify the vendor has processed the order
 - Select **F12 – EDI Status**

Receiving by the Carton



- ▶ There is no easier way to receive than using the ASN
- ▶ Get new ASN's for all vendors on the Receiving List or on the Receive Cartons Window
- ▶ Receive a Box at a time
- ▶ Print tags by box with a carton number tag
- ▶ Missing or extra tags indicate a box was incorrectly packed



Receiving by the Carton

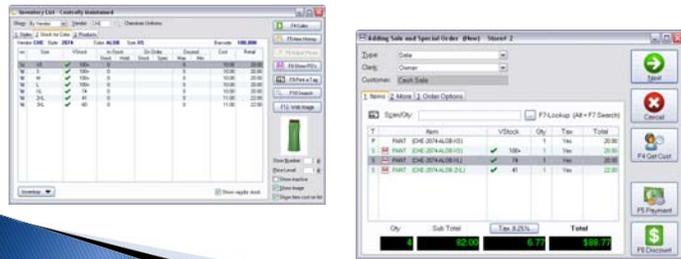


- ▶ Task 1
 - Select **Lists > Receiving > List Button > New List**
 - Type: **Purchase Order Receipt**
 - Vendor: **LAN** (Landau)
 - Select **F3 – Add ASN**
 - Check **Add each item to the tag queue** – at the bottom
 - Select Carton number ending in **..8013**
 - Select **Add**
 - Select **OK** to Save the cartons to the List, then Select OK to save the List.
 - How many tags are in the Tag Queue? _____
 - **Note:** A tag is printed for each carton number – hence the extra label
 - Select **OK** to save the Receiving list
 - Could there be an easier way to receive?

Real-Time Vendor Stock Reporting



- ▶ Automatically displays the current stock level reported by the Vendor's system
- ▶ Available in Sales Entry, Purchase Order Entry, and the Inventory List



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Real-Time Vendor Stock Reporting



- ▶ Task 1
 - Use the **Inventory List** to determine the stock level for the following items

Note: When you use vendor stock reporting in your store, make sure "Show vendor stock" is checked on the "Stock for Color" Tab.

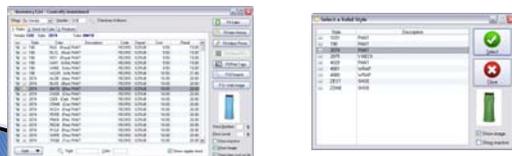
Item	Vendor Stock Level
CHE-2074-ALOB-XS	
CHE-2074-ALOB-XL	
CHE-2074-ALOB-2XL	

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Vendor Provided Product Images



- ▶ Automatically Downloaded
 - Anytime new items are added to the Inventory List
 - Anytime new items are received at a remote location from the polling location
- ▶ Automatically Displayed
 - Inventory List, Inventory Search, Item Entry for Sales Entry, Selection Lists, and the WebStore
- ▶ The Web Server
 - Receives request to download images from The Uniform Solution



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Vendor Provided Product Images



- ▶ Task 1
 - Use **the Inventory List** to determine the image color for the items below
 - Select **Lists > Inventory**
 - Use the Inventory Standards List to view the color swatches for the Cherokee colors below
 - Select **Lists > Inventory Standards > Colors > Cherokee**

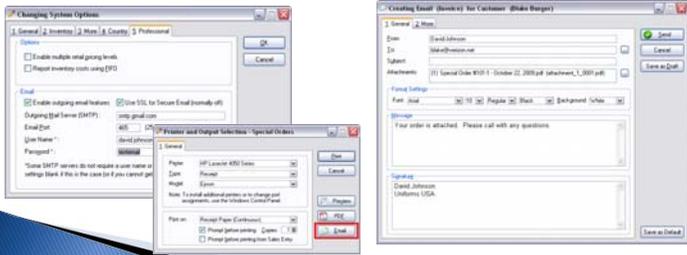
Item	Image Color
CHE-2074-ALOB	
CHE-2074-CHOB	
CHE-2074-CIEB	

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Email



- ▶ The Uniform Solution
 - Email Invoices, Account Statements, and Reports
- ▶ The WebStore
 - Email is used as the source of communication between the WebStore and your customer



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Email



- ▶ Task 1 – Set up Email
 - Select **Setup > System Options > Email** Tab
 - Check **“Enable outgoing email features”**
 - Check **“Use SSL for secure email”**
 - Outgoing Mail Server Port (SMTP): **smtp.gmail.com**
 - Email Port: **465**
 - User Name: **mygooglename**
 - Password: **mygooglepassword**
 - Select the **OK** button
- ▶ Task 2 – Email an Open Order
 - Select the **“Orders”** button on the application toolbar
 - Highlight an order and select **F9-Print**
 - Select the **Email** button on the Printer and Output Selection window
 - Select **OK** on the “Enter the Name of the PDF File to Email” dialog
 - Review the options on the “Creating Email” form
 - See, it’s that easy

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Questions



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